MARYLAND JUDICIARY

G E A R S
General Enterprise And Resource Support
Quick Reference Tip Sheet

<mark>LAST REVISED DATE: 02/26/2018</mark>

General Information

Task	Process Information
Running the Requisition Budgetary Activity Report	The ***Requisition Budgetary Activity Report*** provides budgetary amount information for requisitions according to report request parameters.

GEARS Navigation

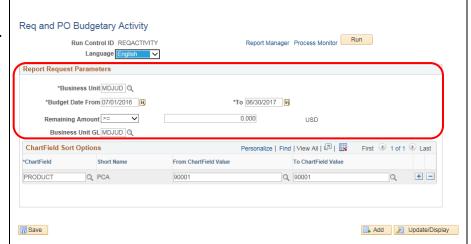| Main Menu> Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity	Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Reports ▾ > Req and PO Budgetary Activity

1.0   Process

This document is intended to provide a quick reference to running the Requisition Budgetary Activity Report in GEARS.

STEP	ACTION	DETAILS
1.	**Create the Run Control ID.** The first time you run the PO and Req Budgetary Activity Report, you must create a new Run Control ID. Click on the `Add a New Value` tab. **NOTE:** A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the *Find an Existing Value* tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.	**Req and PO Budgetary Activity** Find an Existing Value | **Add a New Value** Run Control ID [ ] Add Find an Existing Value Control ID that you Search created, click the tab and then click the button. A list of Run Control IDs appear.
2.	**Enter a Run Control ID.** In this example, "REQACTIVITY" is used as the Run Control ID.	Run Control ID REQACTIVITY ✕
3.	Click the `Add` button.	

4. **Specify the Report Parameters.** The `Report Selection Parameters` page displays. The report parameters determine what information appears in the report.

Notes: Fields with an asterisk (*) must be completed.

Req and PO Budgetary Activity

Run Control ID REQACTIVITY   Report Manager Process Monitor   [Run]
Language English

Report Request Parameters

*Business Unit MDJUD
*Budget Date From 07/01/2016   *To 06/30/2017
Remaining Amount >=   0.000   USD
Business Unit GL MDJUD

ChartField Sort Options   Personalize | Find | View All | | First 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value		
PRODUCT	PCA	90001	90001	+	-

[Save]   [Add] [Update/Display]

Report Request Parameters Fields	Description
Business Unit	Business Unit will always be MDJUD.
Budget Date From / To	Enter the budget period of the fiscal year (e.g., From: 07/01/XX/ To: 07/31/XX).
Remaining Amount	Enter the desired remaining amount. NOTE: (optional) use the dropdown box to limit results based on operator parameters (e.g., greater '>' /less '<' than or equal to '=' a desired remaining amount). If you are attempting to view all transactions with remaining balances, you should select the '<>' (Not Equal to) dropdown and 0.000 amount. This selection will allow open POs with either positive or negative balances to display.
Business Unit GL	Business GL Unit will always be MDJUD.

4a. **Specify ChartField Sort Options.** Select the ChartField Sort Options Name criteria for your report (*by a selection or range of selections you wish to be included in your report*).

As an example, you can report on any single or combination of the following fields:

Account (*e.g., 0902 – Office Supplies*)
Product (*PCA, e.g., 40821*)
Budget Ref (Appropriation Year, *e.g., AY2015*)
Class Fld (Appropriation Number, e.g., *A0006 – Admin Office of the Courts*)
Fund Code (Fund, e.g., *0001 – General Fund*)
Operating Unit (Batch Agency, e.g., *C50 Maryland District Court*)

Req and PO Budgetary Activity

Run Control ID REQACTIVITY   Report Manager Process Monitor   [Run]
Language English

Report Request Parameters

*Business Unit MDJUD
*Budget Date From 07/01/2016   *To 06/30/2017
Remaining Amount >=   0.000   USD
Business Unit GL MDJUD

ChartField Sort Options   Personalize | Find | View All | | First 1-2 of 2 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value		
PRODUCT	PCA	90001	90001	+	-
ACCOUNT	Account	0900	0902	+	-

[Save]   [Add] [Update/Display]

NOTE: The more selection criteria entered, the more granular your results will be. You can select multiple field names. Add/delete field names as needed by using the "**+**" and "**-** "buttons to the right of the line.

	Program (e.g., *B005 – Maryland Judicial Conference*) **Project ID** (*NOTE: this field is primarily used with Grants*)	**ChartField Sort Options** — Personalize | Find | View All | First 1-2 of 2 Last *ChartField*: PRODUCT / PCA / From ChartField Value 40821 / To ChartField Value 40821 ACCOUNT / Account / 0900 / 0902
5.	**Run the Report.** Click the **Run** button.	
6.	**Schedule the Process.** The **Process Scheduler Request** page displays. Select/Enter the appropriate criteria: a. Click the checkbox ☑ next to the Procurement Budgetary Activity. b. Ensure the report Format is 'PDF'.	**Process Scheduler Request** Help User ID joseph.george Run Control ID REQACTIVITY Server Name [▾] Run Date 04/14/2017 Recurrence [▾] Run Time 12:27:17PM Reset to Current Date/Time Time Zone [ ] **Process List** Select | Description | Process Name | Process Type | *Type | *Format | Distribution ☐ Procurement Budgetary Activity | POS8001 | SQR Report | Web | PDF | Distribution ☑ Requisition Budgetary Activity | POS8002 | SQR Report | Web | PDF | Distribution OK Cancel
7.	Click the **OK** button.	
8.	**Make Sure The Process Runs.** The **Report Selection Parameters** page displays. Make note of your Process Instance Number. In this example, the Process Instance Number is **1195807**. Click the **Process Monitor** link.	**Req and PO Budgetary Activity** Run Control ID REQACTIVITY Report Manager Process Monitor Run Language English ▾ Process Instance:1195807 **Report Request Parameters** *Business Unit MDJUD *Budget Date From 07/01/2016 *To 06/30/2017 Remaining Amount >= [ ] 0.000 USD Business Unit GL MDJUD **ChartField Sort Options** Personalize | Find | View All | First 1-2 of 2 Last *ChartField | Short Name | From ChartField Value | To ChartField Value PRODUCT | PCA | 90001 | 90001 ACCOUNT | Account | 0900 | 0902 Save Add Update/Display
9.	**Check the Process Status.** The **Process List** page displays. Click the **Refresh** button and continue clicking the *Refresh* button until the **Run Status** = Success and **Distribution Status** = Posted.	**Process List** Personalize | Find | View All | First 1-29 of 29 Last Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details ☐ | 1195807 | | SQR Report | POS8002 | joseph.george | 04/14/2017 12:27:17PM EDT | Success | Posted | Details

Run Status	Description
Queued	The process is waiting to run.
Initiated	The process has started.
Processing	The process is running.
No Success	The process did not run, call the Help Desk.
Warning	The process ran, but there may be a problem. See if you can retrieve the report, if not, call the Help Desk.
Success	The process ran successfully.

Distribution Status	Description
Queued	The process is waiting to run.

NA	The process is still running.
Posted	The report has posted.
Not Posted	The report did not post, call the Help Desk.

10. **Retrieve the Report.** Click the Go back to Req and PO Budgetary Activity link to return to the Report Selection Parameters page.

11. The Req and PO Budgetary Activity page displays.

Click the Report Manager link.

Req and PO Budgetary Activity

Run Control ID REQACTIVITY   Report Manager   Process Monitor   [Run]
Language English ▼

Report Request Parameters

*Business Unit MDJUD 🔍

*Budget Date From 07/01/2016 📅   *To 06/30/2017 📅

Remaining Amount >= ▼   0.000   USD

Business Unit GL MDJUD 🔍

12. Click the Administration tab.

13. **View the Report.** The View Reports page displays.

Click the link of the report you wish to view that corresponds to the Process Instance Number that was run.

The report will open as a PDF file in a separate window. See below for sample output.

*NOTE: The report will only include Reqs that are Approved and have been budget checked with no errors.

List | Explorer | **Administration** | Archives

View Reports For

User ID joseph.george ×   Type [____] ▼ Last ▼   1   Days ▼   [Refresh]
Status [____] ▼   Folder [____] ▼   Instance [____] to [____]

Report List   Personalize | Find | View All | 📄 | 📊   First ◀ 1-9 of 9 ▶ Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
☐	1146519	1195807	Requisition Budgetary Activity	04/14/2017 12:57:56PM	Acrobat (*.pdf)	Posted	Details

14.

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Report ID:POS8002                    PeopleSoft Purchasing                    Page No.  1
                          REQUISITION BUDGETARY ACTIVITY REPORT               Run Date: 04/14/2017
                                                                              Run Time: 12:58:06
Business Unit: MDJUD          Budget Date From 01-JUL-2016 To 30-JUN-2017 Remaining Amount >=      0.00
Account From 0900 To 0902     PCA From 90001 To 90001


REQ ID      Line\Sched\Dist  Original REQ Amount -  Liquidated Amount  =  Remaining Amount   PO Amount   Account    PCA

0000005464    10\1\1              305.00                305.00              0.00              274.40      0902       90001
0000005519    1\1\1             2,616.72              2,616.72              0.00            2,616.72      0902       90001
0000005520    10\1\1            1,220.00              1,220.00              0.00            1,090.00      0902       90001
0000005520    11\1\1            1,220.00              1,220.00              0.00            1,091.60      0902       90001
0000005520    17\1\1              176.00                176.00              0.00              136.48      0902       90001
0000005520    20\1\1               60.00                 60.00              0.00               44.40      0902       90001
0000005524    10\1\1              732.00                732.00              0.00              654.00      0902       90001
0000005524    11\1\1              732.00                732.00              0.00              654.96      0902       90001
0000006053    1\1\1              100.00                 100.00              0.00              100.00      0902       90001
                          ---------------------  ---------------------  ---------------------  ---------------------
              Totals:          7,161.72              7,161.72              0.00            6,662.56
                          =====================  =====================  =====================  =====================
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End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.